## Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

 Date/Time Stamp: SECRETARY OF THE SENATE PUBLIC RECORDS 2018 SEP -6
2018 SEP -6 AM 10: 00

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

Private Sponsor(s) (list	all): The Aspen In	stitute, Inc. (Educati	on and Society F	Program)
Travel date(s): Augus	t 7-9, 2018			
Name of accompanying Relationship to Travele	•	<del> </del>	· · • • • • • • • • • • • • • • • • • •	
	OSTS IN EMPLOYEE	EASE DUE TO THE ACCENTAGE EXPENSES. (Attach additional)		JSE OR DEPENDENT CHILD, ONI
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☑ Good Faith Estimate □ Actual Amount	\$177.98	\$234.00	\$132.75	\$211.63 meeting room fees (includes meeting facilities, set up/take down, cleaning, meeting materials)
Expenses for Accomp	anying Spouse or De	ependent Child (if applied	able):	Thecting materials,
	Transportation  Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
Good Faith Estimate				
☐ Actual Amount				•
Provide a description necessary.):  Please			te Rule 35.2(c)(6). (	Attach additional pages if
	· · · · · · · · · · · · · · · · · · ·			
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TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

95B (Date)

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(Signature of Supervising Senator/Officer)

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(Revised 10/19/15)

### EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC JUL 26"18pm 4:50

Form RE-1

required post-travel disclosure.	
Name of Traveler:	Matthew Stern
Employing Office/Committee:	Senate HELP Committee
Private Sponsor(s) (list all): The Aspen	nstitute, Inc. "Education and Society Program"
Travel date(s): August 7-9, 2018	
Note: If you plan to extend the trip	for any reason you must notify the Committee.
Destination(s): Queenstown, MD	· · · · · · · · · · · · · · · · · · ·
Explain how this trip is specifically connec	ted to the traveler's official or representational duties:
implementation of the Every Stude	Society program is convening senior education staffers on the nt Succeeds Act. As a professional staff member on the HELP on programs and implementation of this legislation.
Name of accompanying family member (if Relationship to Employee: Spouse Cartify that the information contained in the Table 18	
(Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SEN Secretary for the Majority, Secretary for the Min	ATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, ority, and Chaplain):
Deinator Alexandre (Print Senator's/Officer's Name)	hereby authorize Malthan Stell (Print Traveler's Name)
elated expenses for travel to the event descr	accept payment or reimbursement for necessary transportation, lodging, and ibed above. I have determined that this travel is in connection with his or her er, and will not create the appearance that he or she is using public office for
have also determined that the attendance of the Senate. (signify "yes" by checking box)	the employee's spouse or child is appropriate to assist in the representation
7/26/18	Lauran Adoxander
(Date)	(Signature of Supervising Senator/Officer)

### PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

The	Aspen Institute, Inc. (Education and Society Program)
Des	cription of the trip: Aspen Institute Education and Society program sponsored convening for senior
	cation staffers on the Implementation of the Every Student Succeeds Act (ESSA) and next steps.
Dat	es of travel: August 7-9, 2018
	ce of travel: Queenstown, MD
Nar	ne and title of Senate invitees: Please see attached roster
	rtify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. $-OR-$
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	– AND –
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
I ce	rtify that:
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement.  - AND -
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign princ except as provided for by Committee regulations relating to lobbyist accompaniment (see question).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	<ul> <li>(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.         <ul> <li>OR −</li> </ul> </li> </ul>
	<ul> <li>□ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).</li> <li>- OR -</li> </ul>
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B)  If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
	<u>-</u>
11.	An itinerary for the trip is attached to this form. I <i>certify</i> that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and
	execution of the convening. (see continued response)
•	·
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster
	leadership based on enduring values and provide a non-partisan forum for the exchange of ideas.
	(see continued response)
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Aspen Institute has a nearly forty year history of conducting non-partisan educational forums, which
	often include Members of Congress and staff. The Aspen Institute Education and Society program
	has been conducting convenings for Congressional education staff for eleven years.

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The Aspen Institute holds numerous educational activities, including educational briefings, roundtables,					
forums, and confere	ences for a diverse range	e of attendees including	federal and state	policymakers,	
business and organ	izational leaders, memb	ers of the press and the	e general (see co	ntinued response)	
Total Expenses for E	Each Participant:				
: -	Transportation Expenses	Lodging  Expenses	Meal Expenses	Other Expenses	
Good Faith estimate  Actual Amounts	\$68.22(round trip mileage and tolls)	\$234.00 for two nights total	\$132.75	\$211.63 meeting room fees (includes meeting facilitie set up/take dow cleaning, meetin materials)	
•	trip involves an event the trip involves an event		•	_	
	•				
b) The trip is organiz	zed specifically with rega	ard to Congressional sta	aff participation in		
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their learning on important Reason for selecting The location is close experts brought in to	zed specifically with regardless of the Every the location of the even e to Washington, DC for	ard to Congressional start of Student Succeeds Act of the congressional start of the congression	aff participation in allows faculty men	order to support	
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21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	Rooms are \$117.00 per day, which reflects the per diem limit
	Meals are 8/7/18 \$36.75 per day, 8/8/18 \$69.00 per day, 8/9/18, \$27.00 per day, which reflects the per
	diem limit
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	Transportation is not provided; mileage will be reimbursed for participants' travel by personal car
24.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).  List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why
	the entertainment is an integral part of the event:  None
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):  Signature of Travel Sponsor:
	Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs
	Name of Organization: The Aspen Institute
	Address: 2300 N Street NW, Suite 700, Washington, DC 20037
	Telephone Number: 202-736-5859 (Lisa Jones, Deputy General Counsel)
	Fax Number: 202-467-0790
	E-mail Address: lisa.jones@aspeninst.org

Appendix to Private Sponsor Travel Certification Form

Aspen Institute Senior Congressional Education Staff Network Retreat, August 7-9, 2018

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) -- The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) — The Aspen Institute Education and Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages off-the-record, candid exchanges of ideas to support staffers' learning.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) — The Aspen Institute organizes numerous educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

### Aspen Senior Congressional Education Staff Network Retreat

# Implementing ESSA: Accountability Systems, State and District Finance, and Human Capital Strategy

Wye River Conference Center 600 Aspen Drive Queenstown, MD 21658 Phone: (410) 827-7400

August 7-9, 2018

Please provide names and titles of ALL Senate Members and employees you are inviting.

The Senate employees invited (listed below) are senior education staff responsible for education issues; they are invited specifically because of their education portfolio to meet with leaders and educational experts from states, districts, research, and support organizations to engage in non-partisan dialogue on the impact of federal policy on different levels of the education system.

### SENATE CONGRESSIONAL STAFF

#### **Amanda Beaumont**

Minority Deputy Education Policy Director Senate Committee on Health, Education, Labor, and Pensions, Ranking Member

#### **Jake Cornett**

Minority Senior Advisor Senate Committee on Health, Education, Labor, and Pensions

#### Laura Friedel

Majority Clerk

Senate Appropriations Subcommittee on Labor, Health and Human Services, and Education

#### Mike Gentile

Majority Professional Staff Member Senate Appropriations Subcommittee on Labor, Health and Human Services, and Education

#### Jenn Hatfield

Majority Education Research Assistant Senate Committee on Health, Education, Labor, and Pensions

### Jordan Hynes

Majority Professional Staff Member Senate Committee on Health, Education, Labor, and Pensions

#### Alex Keenan

Minority Clerk Senate Appropriations Subcommittee on Labor, Health and Human Services, and Education

#### Allie Kimmel

Minority Education Policy Advisor Senate Committee on Health, Education, Labor, and Pensions

#### Mark Laisch

Minority Professional Staff Member Senate Appropriations Subcommittee on Labor, Health and Human Services, and Education

#### **Kara Marchione**

Minority Education Policy Director Senate Committee on Health, Education, Labor, and Pensions

#### **Bob Moran**

Majority Deputy Education Policy Director Senate Committee on Health, Education, Labor, and Pensions

#### **Matt Stern**

Majority Professional Staff Senate Committee on Health, Education, Labor, and Pensions



June 18, 2018

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat — "Implementing ESSA:

Accountability Systems, State and District Finance, and Human Capital Strategy" — for the Aspen Senior Congressional Education Staff Network from 12:00 PM Tuesday, August 7, 2018 to 1:00 PM Thursday, August 9, 2018 at the Aspen Institute's Wye River Conference Center, located 60 miles from Washington, DC.

At this convening, staffers will hear from state and district leaders on the implementation of the Every Student Succeeds Act. Staffers will understand how states implementing their ESSA plans and how their accountability systems are identifying schools for support, as well as how states and districts are approaching new financial requirements and opportunities in ESSA. Participants will also have a chance to explore state and district human capital strategy. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We are committed to working with you and the Senate Ethics Committee to ensure compliance with the Senate rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

A detailed agenda listing discussion sessions

A completed Private Sponsor Travel Certification Form and appendix

A list of invited Senate staffers

A blank Employee Pre-Travel Authorization form

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Senate Ethics Committee (220 Hart) no later than Monday, July 9, 2018. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at 12:00 PM on Tuesday, August 7, 2018, at the Wye River Conference Center and will conclude at 11:30 AM on Thursday, August 9, 2018. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there. Warm regards

Ross Wiener

Danielle Gonzales

Marisa Goldstein

Doug Mesecar

### Aspen Senior Congressional Education Staff Network Retreat

### Implementing ESSA: Accountability Systems and State and District Finance

**Wye River Conference Center** 600 Aspen Drive Queenstown, MD 21658 P: 410-827-7400

August 7-9, 2018

### **AGENDA**

### **Retreat Goals:**

- Understand how states are implementing their Every Student Succeeds Act (ESSA) plans and how they will support implementation at different levels of the system;
- Conduct an in-depth review of the operation and implications of states' ESSA accountability systems for identifying and supporting schools;
- Explore how district leaders develop and track budgets in the context of ESSA funding and requirements, including how district budgets connect to the district's overall strategy;
- Engage in active learning and build working relationships with education leaders from the field, as well as with colleagues from different parties and chambers.

### Tuesday, August 7, 2018

12:00 PM	Arrival and Check-In
12:30 - 1:00 PM	Lunch
1:15 - 1:45 PM	Welcome, Overview, and Retreat Objectives
	To guide the retreat's discussion, Congressional staffers and faculty members will beg by sharing their top learning objectives for the convening.
1:45 - 3:00 PM	Session I: Capacity to Implement ESSA
	Tommy Chang, former Superintendent, Boston Public Schools
	Alicia Garcia, Principal Policy Analyst, American Institutes for Research
	Jennifer McCormick, Superintendent of Public Instruction, Indiana Department of Education
	Guiding Questions:
	What is the preparedness of states and LEAs to effectively implement ESSA's sch

- hool and subgroup identification and improvement requirements, including systems, communications, plans, and supports?
- How are SEAs and LEAs currently structured and staffed? What, if any, changes are being made in response to ESSA requirements (i.e., school improvement, financial



- transparency requirements, etc.)? Are staffing needs concentrated around the need for new types of expertise or the need for just more staff?
- How do SEA staff perceive their role? How do federal expectations for SEAs align with those perceptions, and with state and local stakeholders' expectations for SEAs? If not, what challenges does that present?
- How are states, LEAs, and the U.S. Department of Education (ED) balancing compliance and monitoring with providing guidance and support? What resources and supports do they need to navigate this shift?
- What resources or supports is the U.S. Department of Education (ED) or federallyfunded centers currently providing to states and LEAs to help implement ESSA? Are there additional supports that would be helpful, or improvements that can be made to current practice?

### 3:00 – 3:15 PM Break and individual reflection

### 3:15 – 5:15 PM Session II: Digging into District Budgeting from Development to Execution

Marguerite Roza (Director, Edunomics Lab) lead faculty and staff in an exploration of the different ways LEA leaders deploy their funds to schools and how decisions get made about resource tradeoffs. As a group, we will discuss the sources of funding, constraints and opportunities with funding, basic strategies LEA leaders use to divvy up funds across schools, and linkages of funding with LEA strategies and outcomes. We will also explore the flexibilities (or lack thereof) and who is involved in resource allocation decisions.

### 5:15 – 5:30 PM Taking stock: Staff reflections and feedback to guide remaining discussions

### 6:30 PM Networking Reception with Expert Faculty

Staffers will have the opportunity to network with participants during the reception.

### 7:00 – 8:30 PM Working Dinner with Discussion of Earlier Sessions

### Wednesday, August 8, 2018

7:30 - 8:30 AM

8:30 – 8:45 AM	Group reflection on Day 1: what thoughts and questions were raised for further discussion?

### 8:45 – 10:15 AM <u>Session III: Reflecting on District Budgeting</u>

**Guiding Questions:** 

Breakfast

- How well do LEA leaders understand federal funding formulas, allocations, flexibilities, and programmatic uses of funds? How are tensions and tradeoffs between federal, state, and local funding and requirements resolved?
- How are SEA and LEA leaders preparing to report on, utilize, and respond to ESSA's financial reporting requirements? What are the implications for equity?
- What lessons can be learned from the initial rollout of the Weighted Student Funding Pilot?



- How are SEA and LEA leaders addressing resource reviews as part of schools' improvement plans?
- How do LEA leaders understand and take advantage of the transferability authority in ESSA? In addition, how do LEA leaders typically implement the consolidation of funds permitted under schoolwides?

### 10:15 – 10:35 AM Break and individual reflection

### 10:35 AM - 11:55 PM Session IV: Budgeting and Strategy

This session will include a mix of full-group discussion and an opportunity for faculty and staffers to engage in one-on-one discussions about the implications of our conversations. Guiding Questions:

- What processes state and LEA leaders employ for weighing budgetary choices and trade-offs? To what extent do evidence, outcomes, mandates, and links to strategy factor into those decisions?
- What are the challenges of integrating federal funds with other sources of funds into a coherent budget? And how are federal funds typically distributed, accounted for, and expended?
- How are state and LEA leaders using ESSA's programs and funding (e.g., optional Title II set asides for principals and school leaders, Teacher and School Leader Incentive Program, etc.) to support their broader human capital strategy?
- How are SEA and LEA leaders using funds to support school improvement strategies for all identified schools (e.g., braiding local, state, and federal funds, addressing any resource inequities, connecting schools with resources to meet the needs of underperforming, etc.)?
- Are states using the optional Title II set aside for principal development? If so, what activities and supports are they planning to offer?

12:00 – 1:00 PM Lunch

1:00 – 3:00 PM Session V: Deep Dive into State Accountability Systems

Juan D'Brot (Senior Associate, National Center for the Improvement of Educational Assessment) will lead staff and faculty through a simulated run of a state's ESSA accountability system and discuss implications for which schools are identified for improvement and what it means for state and LEA capacity, budgeting, and overall strategy.

3:00 – 3:15 PM Break and individual reflection

3:15 – 4:30 PM Session VI: Implications of State Accountability Systems

plan described?

Alicia Garcia, Principal Policy Analyst, American Institutes for Research

**Jennifer McCormick**, Superintendent of Public Instruction, Indiana Department of Education

**Guiding Questions:** 

- Is the state accountability model coherent and likely to result in the identification of the schools in greatest need of support?
   Did the model result in school and subgroup identification along the lines the state
- How does the state system address the validity and reliability of results?



- What patterns of school and subgroup identification were observed and how do those compare to expectations?
- How does the state's system surface educational inequities? Are there any inequities that are not apparent in the results that might be overlooked?
- Is the state's system and its output intelligible/useful to internal stakeholders (e.g., LEA leaders) and external stakeholders (e.g., parents, the public)?
- Are SEA and LEA approaches to supporting and improving identified schools appropriate to the actual results of the accountability system?

6:15 PM

**Networking Reception with Expert Faculty** 

Staffers will have the opportunity to network with participants during the reception.

7:00 - 8:30 PM

Working Dinner with Discussion of Earlier Sessions

### Thursday, August 9, 2018

7:30 - 8:30 AM

**Breakfast** 

8:30 - 8:45 AM

Staff reflections and feedback to guide remaining discussion

8:45 - 10:30 AM

Session VII: Pulling It All Together: Making Connections across Priorities

Kim Hendon, Assistant Superintendent, Roanoke City Schools

Erik Johnson, Executive Director of Finance, Denver Public Schools

Jennifer McCormick, Superintendent of Public Instruction, Indiana Department of Education

### **Guiding Questions:**

- How can state and LEA leaders balance budget development, accountability, and human capital strategy to achieve greater coherence? What resources or expertise do they need?
- As state and LEA leaders begin implementing their accountability systems and identifying schools and supporting/improving those schools, what issues do they need to address (i.e., building internal capacity, identifying resources, addressing resources, examining human capital policy and practice, etc.)?
- What supports will state and LEA leaders need to navigate these challenges or take advantage of these opportunities?
- What are the most important roles for ED as states and LEAs move into accountability system implementation and school identification? Are there ways ED or federally-funded centers can support greater coherence at the state and LEA level?

10:30 - 10:45 AM

Break

10:45 - 11:00 AM

Complete Retreat Evaluation

11:00 - 11:30 AM

Final Observations from Expert Faculty

11:30 - 12:00 PM

Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network

12:00 – 1:00 PM

Lunch and Adjourn